

SiteManager **Training Manual**



Module B
Chapter 3

**Daily Work Reports (+)
Diary Adjustments**

Section B-3-1 **Adjusting Charge Days to a Contract or Milestone**

Student's Version

Indiana Department of Transportation
September 2007, Version 3.7b

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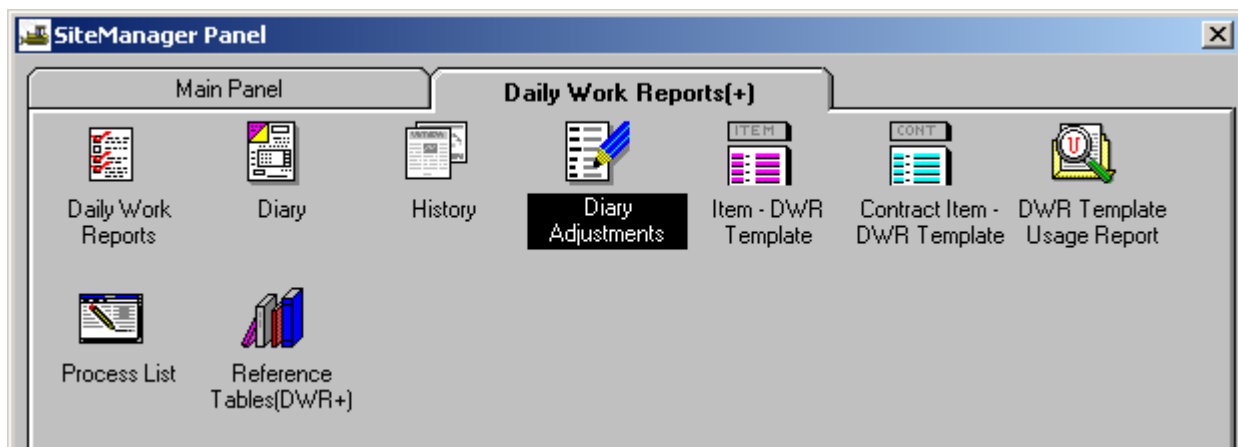
Adjusting Charge Days to a Contract or Milestone

This section will explain how to adjust charged or uncharged days to a contract or milestone in a diary that has been locked.

If only **Milestone** charge information is to be changed, “click” on the **Milestones** tab and skip to page 9 of this module.



“Double-click” on **Daily Work Reports (+)** located on the Main Panel.



“Double-click” on **Diary Adjustments**.

Select Diary Adjustment

Selection

Contract ID
Diary

Find :

Contract ID

Contract ID	Vendor ID	Fed State Proj Nbr	Status	County	Lvl 2	Lvl 3	Lvl 4	Loca
dea90004	99-9999966	STP 3387005	ACTV	C087	660			ON SR 261 AT QA
MT-DOCS	00-0000000	MT_DOCS	ACTV	C094	900			MISC MATERIALS
R-90001	99-9999999	STP 3387005	ACTV	C087	660			ON SR 261 AT QA
R-90002	99-9999988	STP 3387005	ACTV	C087	660			ON SR 261 AT QA
R-90003	99-9999977	STP 3387005	ACTV	C087	660			ON SR 261 AT QA
R-90004	99-9999966	STP 3387005	ACTV	C087	660			ON SR 261 AT QA

OK Cancel

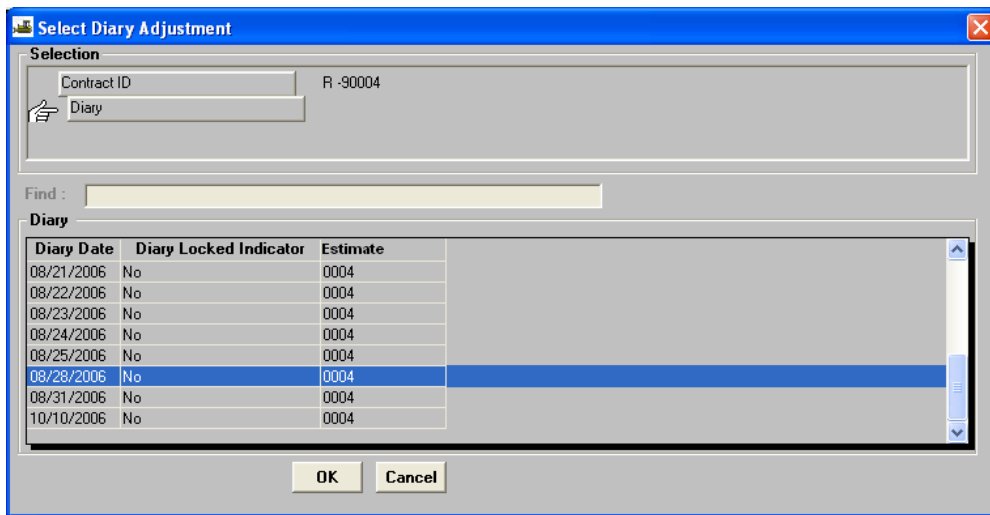
The Select Diary Adjustment window appears.

The Bottom Panel contains the following columns:

- **Contract ID:** the **Contract ID** is the identification number assigned to the contract.
- **Vendor ID:** the **Vendor ID** is the INDOT assigned identification number for the Prime Contractor.
- **Fed State Proj Nbr:** the **Fed State Proj Nbr** is the unique identifier for the project.
- **Status:** the **Status** column indicates current status of the project, Active, Pending, Complete, or Archived.
- **County:** the **County** column shows the County where the majority of the work is located.
- **Lvl 2:** The **Lvl 2** column shows the District office administering the contract.
- **Lvl 3:** The **Lvl** column is not utilized by INDOT.
- **Lvl 4:** The **Lvl 4** column is not utilized by INDOT.
- **Location Description 1:** the **Location Description 1** column contains the description of the actual limits of the contract.

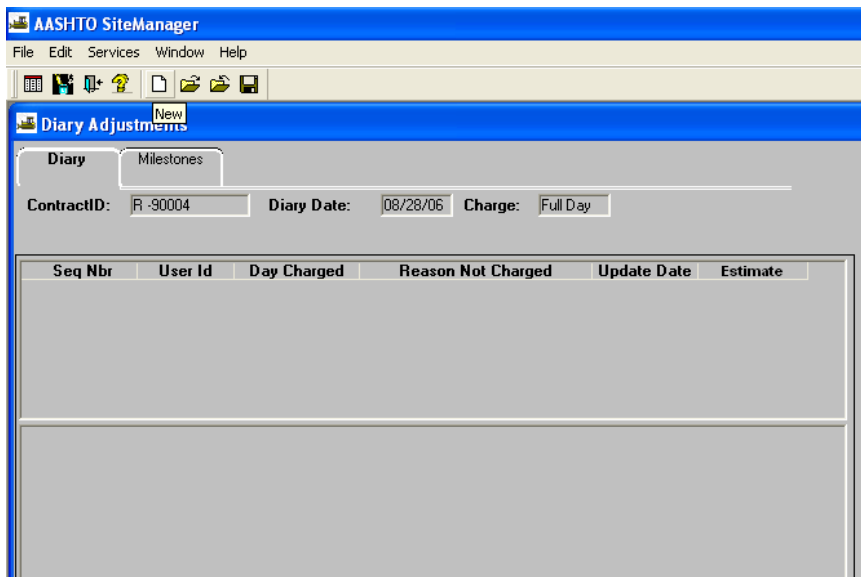
“Double-click” on the appropriate **Contract ID**.

NOTE: This step will be skipped if the Diary Adjustment was already opened.



“Double-click” on the appropriate **Diary Date**.

NOTE: This step will be skipped if the Diary Adjustment window was already opened.



“Click” the **New**  button located on the toolbar.

“Click” in the bottom panel to enter information.

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File Edit Services Window Help

Diary Adjustments

Diary Milestones

ContractID: R-90004 Diary Date: 08/28/06 Charge: Full Day

Seq Nbr	User Id	Day Charged	Reason Not Charged	Update Date	Estimate
1	update	No Charge	Railroad Conflict	00/00/00	

Day Charged: No Charge Reason Not Charged: Railroad Conflict

User Id: update Update Date: Holiday

Remarks:

Railroad Conflict
Right-of-Way
Saturday/Sunday
Concrete Cure Period
Environmental
Legal Holiday
Railroad
Saturday
Waiting for Final Inspection

The **Diary** tab has the following information:

- **Day Charged:** The **Day Charged** would be either Full Day or No Charged.

“Click” on the appropriate **Reason Not Charged**. **Reason Not Charged** is the reason that the day will not be charged and is only required when using **No Day Charged**.

Area Wide Strike

Department Ordered Suspension

Inclement Weather

Other – See Remarks

Right-of-Way

Utility

Waiting for Pre-Final Inspection

Concrete Cure Period

Environmental

Legal Holiday

Railroad

Saturday

Waiting for Final Inspection

This field will be grayed-out if the **Day Charged** type is “Full Day”.

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File Edit Services Window Help

Diary Adjustments

Diary | Milestones

ContractID: R-90004 | Diary Date: 08/28/06 | Charge: Full Day

Seq Nbr	User Id	Day Charged	Reason Not Charged	Update Date	Estimate
1	update	No Charge	Railroad Conflict	00/00/00	

Day Charged: No Charge | Reason Not Charged: Railroad Conflict | Update Date: Holiday

User Id: update | Update Date: Holiday

Remarks:

- Railroad Conflict
- Right-of-Way
- Saturday/Sunday

“Click” on the **Credit Reason** from the dropdown list, if appropriate.

- **Seq Nbr:** is a number automatically assigned to each new diary adjustment
- **User Id:** identifies the person creating the Dairy Adjustment and is automatically populated.
- **Day Charged:** is the charge type, either Full day or No Charge.
- **Reason Not Charged:** is shown when **No Charge** is selected in the **Day Charged Field**.
- **Update Date:** is the date the adjustment was made and is automatically populated.
- **Estimate:** shows the associated Pay Estimate that updated the Total Charge and Total No Charge days on the contract and is automatically populated when the estimate is generated.
- **Remarks.:** is a text field used to collect additional information related to the Diary Adjustment. “Enter” remarks in the remarks field if applicable.

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File Edit Services Window Help

Diary Adjustments

Diary Milestones

ContractID: R-90004 Diary Date: 07/19/06 Charge: Full Day

Seq Nbr	User Id	Day Charged	Reason Not Charged	Update Date	Estimate
1	update	No Charge	Railroad Conflict	00/00/00	

Day Charged: No Charge Reason Not Charged: Railroad Conflict


User Id: update Update Date: 00/00/00 Seq Nbr: 1

Remarks:
The railroad did not supply a watchman today and the Contractor was unable to work

“Click” on the **Save**  button located on the toolbar.

NOTE: The window is locked after saving and the middle panel reflects the data entered.
If the charge data needs to be changed again for this date, a new entry will need to be made.

If changes are to be made to the milestone charge information for the same date,
“click” the **Milestones** tab.

Otherwise, exit this window by “clicking” on the **Close**  button on the toolbar.

Milestone tab

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File Edit Services Window Help

Diary Adjustments

Diary Milestones

Contract	Diary Date	Mlstn Nbr	Day Charged	Reason Not Charged
R-90004	08/28/06	02	0	

Seq Nbr	User Id	Day Charged	Reason Not Charged	Update Date	Estimate

“Click” on the appropriate **Mlstn Nbr** (Milestone Number) to which the charge will be changed, located in the top panel.

“Click” the **New**  button located on the toolbar.

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File Edit Services Window Help

Diary Adjustments

Diary Milestones

Contract	Diary Date	Mlstn Nbr	Day Charged	Reason Not Charged
R-90004	08/28/06	02	0	

Seq Nbr	User Id	Day Charged	Reason Not Charged	Update Date	Estimate
1	update			00/00/00	

Day Charged: Reason Not Charged:

User Id: Update Date: Seq Nbr:

Remarks:

“Click” on the **Day Charged** drop-down list located in the bottom panel.

“Click” on the appropriate type of charge.

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File Edit Services Window Help

Diary Adjustments

Diary **Milestones**

Contract	Diary Date	Milstn Nbr	Day Charged	Reason Not Charged
R -90004	08/28/06	02	0	

Seq Nbr	User Id	Day Charged	Reason Not Charged	Update Date	Estimate
1	update	No Charge	Railroad Conflict	00/00/00	

Day Charged: Reason Not Charged:

User Id: Update Date:

Remarks:

Final Contract Review
Holiday
Plan Discrepancy
Railroad Conflict
Right-of-Way

“Click” the **Reason Not Charge** drop-down list and “click” on the appropriate **Reason Not Charged**. This field will be grayed-out if the **Day Charged** type is changed to “Full Day”.

Diary Adjustments

Diary **Milestones**

Contract	Diary Date	Milstn Nbr	Day Charged	Reason Not Charged
R -90004	08/28/06	02	0	

Seq Nbr	User Id	Day Charged	Reason Not Charged	Update Date	Estimate
1	update	No Charge	Railroad Conflict	00/00/00	

Day Charged: Reason Not Charged:

User Id: Update Date: Seq Nbr:

Remarks:

“Enter” remarks in the **Remarks** field.

“Click” on the **Save**  button located on the toolbar.

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File Edit Services Window Help

Diary Adjustments

Diary **Milestones**

Contract	Diary Date	Milstn Nbr	Day Charged	Reason Not Charged
R -90004	08/28/06	02	0	

Seq Nbr	User Id	Day Charged	Reason Not Charged	Update Date	Estimate
1	update	No Charge	Railroad Conflict	09/25/07	

Day Charged: Reason Not Charged:

User Id: Update Date: Seq Nbr:

Remarks:

Notice that the window is locked after saving. If the charge data needs to be changed again for this date, a new entry will need to be made.

“Click” on the **Close**  button located on the toolbar.

Adjusting Charged Days to a Contract or Milestone

Exercise B-4-T Group Exercise

In the following exercise, you will adjust charge days to a Contract or Milestone.

Log into SiteManager as: d90bclip

Password: pass

Navigate from **Main Panel**:

“Double-Click” on **Daily Work Reports (+)**

“Double-Click” on **Diary Adjustments**

“Double-Click” on **Contract ID: R-90004**

“Double-Click” on **Diary Date: 07/31/2006**

“Click” on **New** located on the Toolbar

“Click” on the **Day Charged** dropdown list and Select: **No Charge**

“Click” on the **Reason Not Charged** dropdown list and Select: **Weather**

Enter in the **Remarks**: “Rained the first 3 hours and the Contractor was unable to work”

“Click” on **Save** located on the Toolbar

“Click” on **Close** located on the Toolbar